

Document Definition for Emails

In the **document definition for emails**, you can specify how the automatically generated emails from *Surface Solutions* are structured by default when sending documents such as **invoices**, **offers**, or **orders**. These settings enable consistent and professional communication with your customers without requiring manual adjustments for each sending.

Email Templates for Documents

In the **Email** section, you can define for each document type (e.g., invoice, offer, order, credit note) which content should be used by default when sending. This particularly includes:

- **Subject** of the email, which is pre-filled automatically upon sending.
- **Message text** that forms the email content.
- **CC recipients** that should automatically be added to each email.
- **Standard attachments** that are sent automatically.

This allows, for example, to specify that a certain accompanying message is automatically used for every offer, the accounting department is added as a CC recipient for every invoice, or that an additional information sheet is attached to every order.

Standard Attachments

For each document type, **any number of standard attachments** can be stored. These are automatically inserted when sending the email.

A typical use case is the automatic sending of the **terms and conditions (T&Cs)**, **data sheets**, or **technical attachments** with certain documents.

Email

INVOICE **OFFER** PURCHASE DELIVERY NOTE EMAIL SIGNATURE


+ Add CC

Subject
Your Offer

Body
Dear Sir or Madam,

Please find attached our offer regarding your inquiry. We hope that our offer meets your requirements.
Should you have any questions or require further information, please do not hesitate to contact us at any time. We look forward to your response and hope for a successful collaboration.

Email Attachments (0)


Upload email attachment
All file types supported
or [Browse](#)

[Save](#)

CC Recipients

CC field, one or more email addresses can be entered, which will automatically be added in copy to every email of the same document type.

This is useful, for example, to ensure that the **accounting department** or a specific internal contact automatically receives all sent invoices or offers.

All email settings apply organization-wide by default, but can be individually adjusted during actual sending, as *Surface Solutions* opens the respective **local email client**.

Email Signature

At the end of the section, the **email signature** can be defined.

Unlike the other settings, this applies **at the user level** - meaning each user can store their personal signature here, which is used for their own emails.

This ensures that communication remains both **consistent with the organization's style** and **individually personalized** for the respective sender.

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